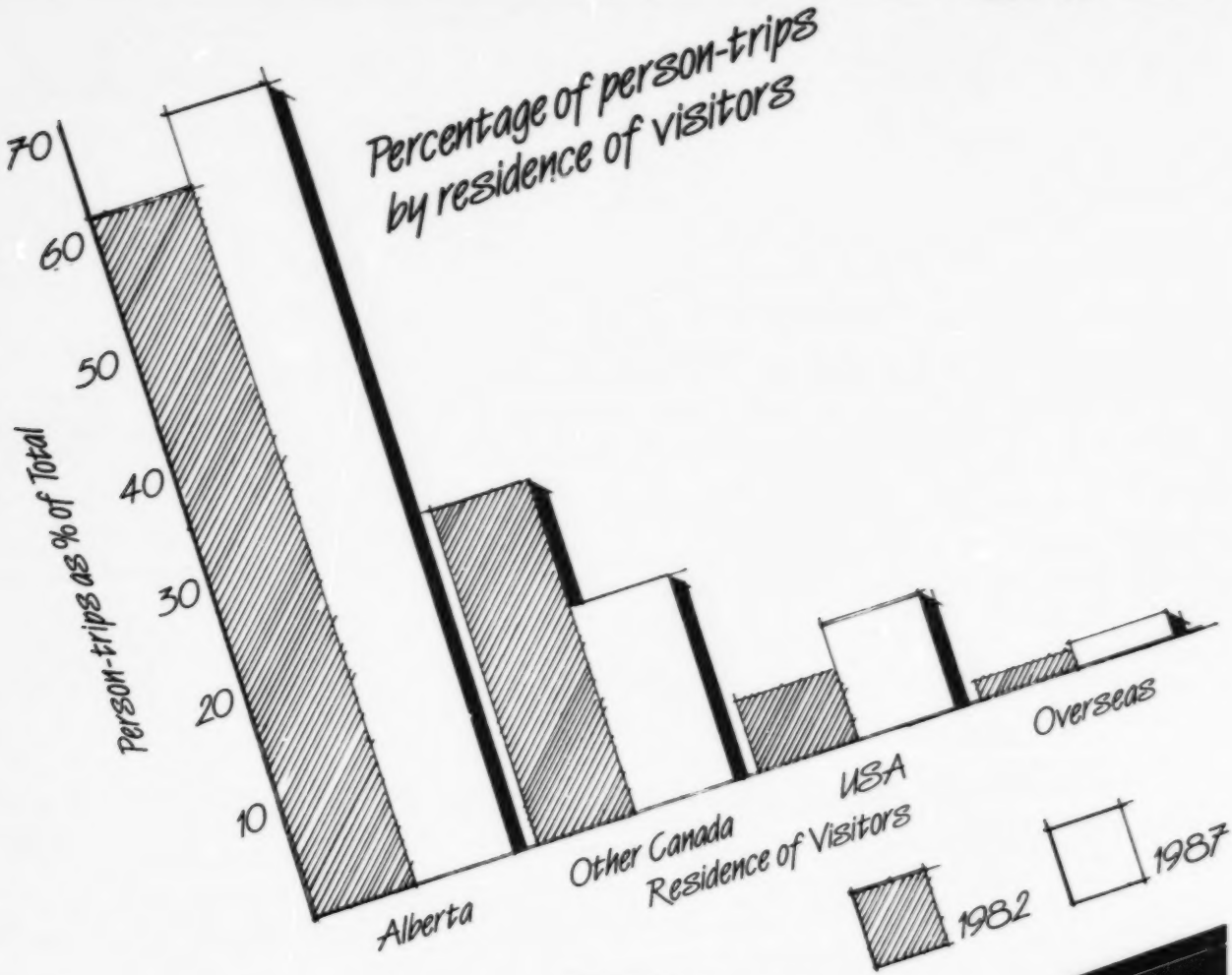
AIRDRIE • BEISEKER • BIGHORN • BLACK DIAMOND
BLACKIE • CALGARY • CANMORE • CAYLEY
CHESTERMERE LAKE • CLUNY • COCHRANE • CROSSFIELD
FOOTHILLS • GHOST LAKE • GLEICHEN • HIGH RIVER • HUSSAR
I.D. #8 • IRRICANA • LONGVIEW • OKOTOKS • ROCKY VIEW • ROCKYFORD
STANDARD • STRATHMORE • TURNER VALLEY • WAIPAROUS • WHEATLAND

Prospect '89



Inside this Issue:
THE REGION'S TOURISM MARKET

CALGARY REGIONAL PLANNING COMMISSION
June 1989

PROSPECT:

THE REGION'S TOURISM MARKET

Regional Planning Services
Calgary Regional Planning Commission
June 1989

90-04702/

TABLE OF CONTENTS

		PAGE
1.0	INTRODUCTION	1
2.0	ALBERTANS TRAVELLING IN ALBERTA	5
3.0	CANADIANS TRAVELLING IN ALBERTA	13
4.0	THE INTERNATIONAL MARKET	17
	4.1 Current Key International Markets	18
	4.2 Characteristics of International Visitors	29
5.0	SUMMARY	45
	NOTES	

LIST OF TABLES

		PAGE
Table 2.1	Albertans as % of Total Person Trips by Zone: 1986	5
Table 4.1	Residence of International Visitors on Trips of One or More Nights to Canada 1980-1986	19
Table 4.2	Region of Residence of U.S. Visitors on Trips of One or More Nights to Canada, 1980-1986	23
Table 4.3	U.S. Overnight Visitors to Alberta	24
Table 4.4	Types of Vacation for U.S. Visitors to Canada	31
Table 4.5	Destination of Most Recent Trip by Japanese Travellers	35
Table 4.6	Destinations of British Travellers	38
Table 4.7	Destinations of West German Travellers	41
Table 4.8	Destinations of French Travellers	43

LIST OF FIGURES

		PAGE
Figure 1.1	Numbers of Person Trips to Alberta by Residence of Visitors	2
Figure 1.2	% of Person Trips by Residence of Visitors	3
Figure 2.1	Alberta Tourism Zones	6
Figure 3.1	Canadian Household Parties by Province of Residence	15
Figure 4.1	Residence of International Visitors to Alberta	21
Figure 4.2	Person Trips to Alberta from U.S. by Region ...	25
Figure 4.3	Person Trips to Alberta from Overseas	27
Figure 4.4	Overseas Visitors as % of Total by Zone	28

PROSPECT: THE REGION'S TOURISM MARKET

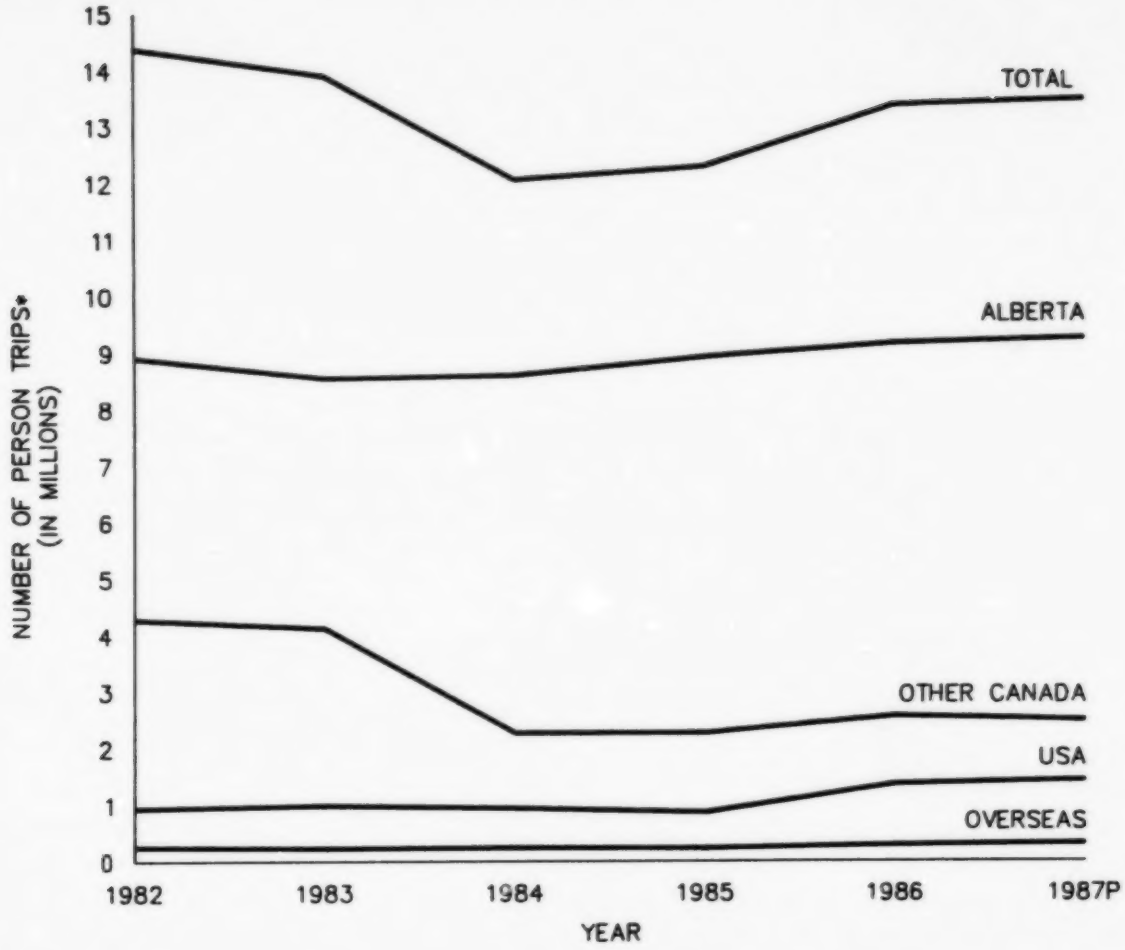
1.0 INTRODUCTION

Many municipalities are interested in attracting more tourists. They feel that tourists will help support the local economy and participate in local recreation opportunities. If municipalities are interested in increasing tourism, it will be helpful for them to study two different components. First, they should examine their product. What facilities and attractions do they have or could they develop to offer visitors? This involves compiling a local inventory. Second, the tourism market must be examined. What type of tourists visit Alberta, our region, and our local attractions? Where do they come from? How do they get here? Why do they come? What are they interested in doing while they are here?

Prospect: The Region's Tourism Market focuses on the second of these two main subjects. It does so by departing, to some extent, from the traditional view of tourists as people from other countries. As Figure 1.1 shows, Albertans represent the bulk of all person trips of at least one night taken in Alberta. In 1987, their proportion of the total was about 69%, as shown in Figure 1.2, up from 62% in 1982. Visitors from the United States or overseas actually account for a very small percentage of tourists in Alberta.

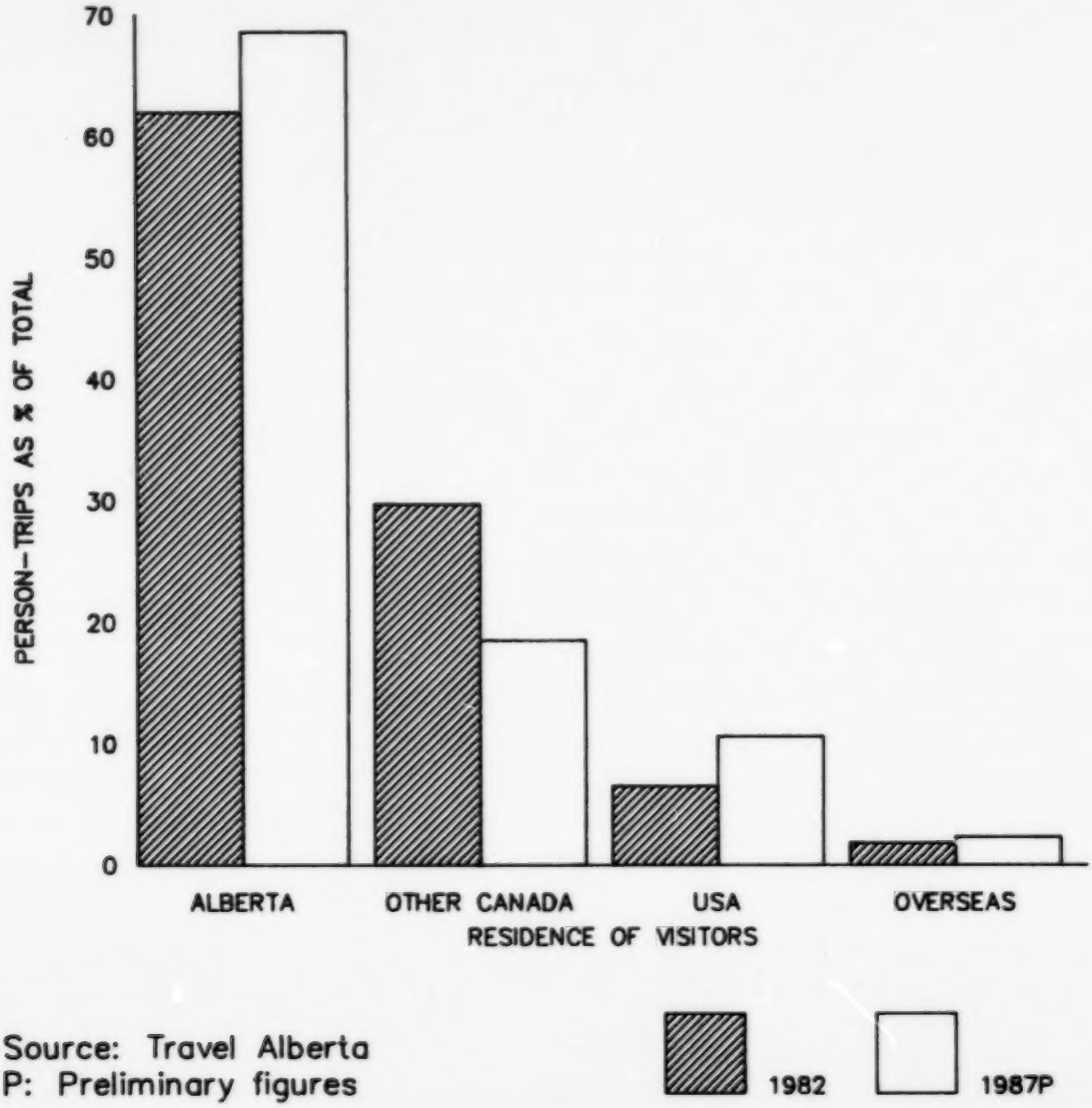
This suggests that local tourism promoters have a large and readily accessible market without even venturing outside the province. Of course, other markets should not be ignored, especially as the international tourism market is increasing and contributes proportionally more to the economy. These markets, however, should be placed in perspective and viewed as a small component of the Alberta tourism scene.

Figure 1.1
NUMBER OF PERSON TRIPS* TO ALBERTA BY RESIDENCE OF VISITORS



Source: Travel Alberta
*Staying one or more nights
P: Preliminary figures

Figure 1.2
PERCENTAGE OF PERSON-TRIPS TO ALBERTA BY RESIDENCE OF VISITORS



Source: Travel Alberta
P: Preliminary figures

This focus on the Albertan visiting his or her own province is not without its difficulties. First, data are not collected and published in ways that support this focus. An otherwise comprehensive study conducted by Travel Alberta in 1982 ignores Alberta residents completely and has not been updated or replaced by any more recent research. Alberta Tourism's publication "Pulse" tends to focus on statistics like direct entries to Alberta from the U.S. and other countries and hotel accommodation, national park attendance and information enquiries, usually without distinguishing between in-province and out-of-province origin.

In addition to this lack of an Alberta focus in the data, other difficulties were encountered in presenting information relevant to the Calgary Regional Planning Commission's planning area. Although a tourism planning area centred in Calgary and extending in all directions to capture destinations and attractions in the surrounding region would appear logical, the tourism zones in place overlap with a Calgary-centred region. For example, attractions within the M.D. of Foothills are included in a tourism zone that reaches south to the Canada-U.S. border, despite their much stronger connection with Calgary. This problem is complicated by the lack of readily available local and sub-zonal data, which, if available, could be used to examine tourism in the Calgary region more directly.

This first edition of the tourism component of Prospect, then, focuses on setting tourism in the Calgary region within the context of Alberta tourism, and establishing a framework for examining tourism data. In future editions of Prospect, more attention will be paid to the economic contribution of the tourism industry and to likely prospects for the future of tourism in the region.

2.0 ALBERTANS TRAVELLING IN ALBERTA

As discussed above, over two-thirds of all person-trips of at least one night in Alberta are taken by Albertans themselves. Residents of the province are therefore its largest market for tourism.

This is even more evident for the four tourist zones which overlap the Calgary Region.

Table 2.1 shows the percentage of all person-trips in Alberta taken by Alberta residents by the pertinent tourism zones. (See Figure 2.1 for location of zones.)

Table 2.1

Albertans as % of Total Person-Trips by Zone
1986

	Total Person Trips ('000)	% of Total Taken from Alberta
Chinook Country	1,346	89.7%
Big Country	373	90.3
David Thompson Country	1,566	95.4
Calgary and District	2,615	77.4

Source: Travel Alberta, Market Development Branch[2]

Note that the only tourism zone completely within the CRPC's planning region is Calgary and District, which includes Calgary, the M.D. of Rocky View and a corridor west to the national park. The M.D. of Foothills falls within Chinook Country, the County of Wheatland is part of Big Country, and the northern portions of Improvement District No. 8 and the M.D. of Bighorn lie within David Thompson Country. Statistics for areas smaller than zones are not readily available, which means that specific figures for the planning region cannot be compiled.

FIGURE 2.1
ALBERTA TOURISM ZONES

CALGARY REGIONAL PLANNING COMMISSION AREA

As discussed in the Introduction, this arrangement of tourism zones is unfortunate. A Calgary-centred tourism region would appear to be more logical from several points of view. As a large city, Calgary is both the gateway to southern Alberta for visitors from outside Alberta, and a major source of visitors for the surrounding area. The northern portion of Chinook Country (the M.D. of Foothills) and the western portion of Big Country (the County of Wheatland) are more influenced by the City of Calgary than they would be by the more extreme portions of these zones. A Calgary-centred tourism zone, extending not only west, but to the north, east and south, would therefore be a logical unit for collection and publication of information about tourists, and would certainly be more useful for the purposes of the Calgary Regional Planning Commission.

However, the zone profiles provided by Travel Alberta can be used to determine some information about the typical Albertan traveller to each of these zones. Some observations are made in each case about how the municipalities in the Calgary region could make use of this information.

About 1.2 million peson trips were taken by Albertans to Chinook Country in 1986. These Albertans visiting this zone typically travelled about 115 miles to their destination and spent an average of one night on the trip, although almost 60% did not stay overnight. Two-thirds of them did not come from Calgary or Edmonton and about half took weekend trips. Almost all of them travelled by car. Forty percent travelled primarily for pleasure, and 32% travelled mainly to visit friends or relatives. However, 55% of Albertans travelling to Chinook Country listed visiting friends and relatives as one of their activities, indicating that it is often a secondary purpose for the trip. Thirty-two percent shopped and 20% participated in sports or outdoor activities.

Although some of the municipalities in the northern portion of the zone may not be tourist destinations in their own right, they may pursue the strategy of providing services to drive through traffic or of attracting such visitors on short-term side trips. For example, Calgary residents driving south to destinations such as the Head-Smashed-In Buffalo Jump Interpretive Centre, Lethbridge and Waterton National Park may stop for services or local attractions along the route. About one-quarter (or approximately 300,000) of the Alberta visitors to Chinook Country in 1986 were from Calgary, so strategies aimed at capturing this market may prove worthwhile.

In addition, the substantial portion of Alberta visitors to the zone who do not stay overnight (60%) may also represent an important market for local services and attractions. A family on a day-trip may enjoy visiting even a small village's local historic attraction or picnic site, and well-placed services or retail outlets may derive benefits.

The significance of visiting friends and relatives should not be overlooked. Such a visit is the primary purpose of 32% of person trips and is also one of the main activities even if it is not the main purpose (55% of person trips). Many of these person trips combine visiting friends and relatives with other trip purposes (including pleasure, business and personal matters) and other activities (including shopping, recreation, sports and outdoor activities, visiting parks and historic sites and sightseeing). Therefore, to the extent that people come to municipalities within and including the M.D. of Foothills to visit friends and relatives, local services, stores and attractions may also benefit.

It may even be a good idea to include the local people who are

hosting the visitors in marketing programs for local attraction. If the friend or relative being visited is aware of a nearby attraction or facility, he or she may suggest that the guests visit it while they are in the area. These friends and relatives may be in a position to become the best local tour guide for their guests.

Compared to the other zones, Big Country received few visitors in 1986, with 337,000 person trips. These numbers, however, are very likely to increase given the popularity of the Tyrrell Museum in Drumheller, which lies outside the Calgary region. Albertans travelling to this zone typically travelled 127 miles to their destination and spent an average of 1.2 nights. (Fifty-four percent spent one or more nights.) Over half came from either Calgary or Edmonton, and most of these came from Calgary (44%). Just over half took weekend trips. Almost all travelled by car. The main purpose of the trip was given as visiting friends and relatives (46%) or pleasure (40%). Fifty-three percent visit friends and relatives as one activity during their trip, while 32% visit a museum or natural display, and 23% sightsee.

Again, municipalities east of Calgary may be able to attract visitors driving from Calgary to, for example, Drumheller. Almost 45% of Albertan visitors to Big Country are from Calgary, for about 150,000 people annually. This drive-through traffic may use local services or take side-trips to visit local attractions. Note that this point applies not only to municipalities within and including the County of Wheatland, but also to the east portion of the M.D. of Rocky View.

In Big Country as a whole, less than half of the person trips

taken by Albertans were day trips. It is probably safe to assume that this proportion increases among people from Calgary visiting or driving through the western portion of the zone, which includes the County of Wheatland. These day-trippers are therefore a significant tourism market for attractions and services east of Calgary, and strategies for capturing this market should be explored at a local or sub-regional level. These might include highway signs, or regional or sub-regional maps showing locations of attractions, available at service stations and restaurants. Some thought should also be given to reaching day-trip and drive-through visitors while they are still planning their trip. This may be more successful than relying on spontaneous decisions made while already on the road.

As in Chinook Country, significant proportions of person-trips in 1986 involved visiting friends and relatives. Forty-six percent were taken primarily for that purpose, while 53% included such visits as one of the trip's activities. Local attractions within the County of Wheatland may be able to target and attract visitors through the local people they would be visiting.

David Thompson Country includes the Red Deer, Sylvan Lake, and Rocky Mountain House areas, and overlaps with only a very small portion of the Calgary region. The information for this zone, therefore, may have only limited applicability to the planning region. About 1.5 million person trips were taken to this zone by Albertans. Albertans visiting this zone in 1986 travelled about 100 miles to their destination, and spent an average of 1.3 nights. (Fifty- six percent spent one night or more on the trip.) Just over half came from Calgary (29%) or Edmonton (22%), and the same proportion travelled on weekends. Ninety-five percent travelled by automobile. Thirty-seven percent travelled mainly for pleasure, 33% travelled mainly to visit friends and

relatives, and 21% travelled mainly for business or conventions. Fifty-one percent visited friends or relatives during the trip, 20% shopped, and 16% participated in sports and outdoor activities.

Although this information may not appear relevant to the Calgary planning region, it may be of some use to municipalities and local attractions north of Calgary along the routes to some of the destinations outside the region. Drive-through traffic from Calgary to the zone accounted for about 430,000 person trips in 1986. Almost half of all person trips to the zone are day-trips. Local attractions north of Calgary may be able to target this day-trip and drive-through market. The point here is that an attraction may not have to be within a tourism zone to derive benefits from tourists visiting that zone.

The Calgary and District Zone attracted over two million person-trips by Albertans in 1986. The typical Albertan visitor to this zone travelled 137 miles and stayed an average of 1.4 nights on the trip. (Fifty-seven percent of Albertans travelling to Calgary and District spent at least one night on their trip.) Almost two-thirds came from places other than Calgary or Edmonton, and over half did not take their trip on the weekend. Ninety-three percent travelled by automobile, and 5% travelled by air. Thirty-six percent travelled primarily for pleasure, 27% travelled mainly to visit friends or relatives, and 24% travelled mainly for business or conventions. Almost 60% of Albertans visiting this zone stayed in accommodation other than hotels, motels, or campgrounds. Twenty-five percent stayed in hotels. The most popular activities for Albertans visiting Calgary and District included visiting friends and relatives (49%), shopping (37%), sightseeing (16%), nightlife and recreational activities (12%), and sports and outdoor activities (10%).

Municipalities in the region surrounding Calgary, and not necessarily in the Calgary and District zone, may be able to benefit from visitors to Calgary from elsewhere in Alberta. Drive-through traffic from other parts of the province heading towards Calgary may need services, or visit local attractions along the route. In addition, visitors based in Calgary may take day-trips outside the city and even outside the zone, and may therefore represent a market for local attractions. Again, about half of Albertan visitors to Calgary and District visit friends and relatives, and the Calgary and area residents may provide a means of reaching those tourists.

These descriptions suggest that, although Alberta is the best source of tourists for Alberta attractions, each of those tourists may not contribute as much proportionately to the Alberta economy as tourists from other parts of Canada, from the U.S. or from overseas. The trips tend to be short, are usually taken by automobile, and do not appear to make extensive use of hotels and motels, relying instead on friends and relatives for accommodation.

However, tourism promoters cannot deny the number of Albertans visiting different parts of thir own province. As suggested above for each zone, the data can be made relevant to local areas, even if specific local data are not readily available. A knowledge of local attractions and facilities, combined with some imaginitive ways of reaching the people likely to visit them, may help to attract these Albertan tourists. After all, these nearby visitors may be most appreciative of local attractions, most likely to make repeat visits, and most likely to influence other people to visit the attractions that impressed them. That is, another Albertan is probably in a better position to visit an

area or an attraction recommended by a neighbour, then would be the case for a European hearing about his neighbour's trip to Canada.

3.0 OTHER CANADIANS TRAVELLING IN ALBERTA

As noted above, visitors to Alberta from other parts of Canada account for about 18.5% of total person-trips in Alberta. The number of person-trips taken by other Canadians to Alberta has dropped from about 4.3 million in 1982 to about 2.5 million in 1987, for a decrease of about 42%. Their share of total visits to Alberta has also declined from almost 30% in 1982 to the 1987 figure of 18.5%.[3] (Some reasons for this decline are suggested at the end of this chapter.)

A 1982 Travel Alberta study provides some information about other Canadian tourists to Alberta.[4] The study projected 1,504,000 household visits to Alberta by residents of other parts of Canada. The average number of nights spent in Alberta was 6.19, and the average number of nights spent away from home was 14.59.

Sixteen percent of all other Canadian visitors to Alberta visited the province in the spring, 56% did so in the summer, and 28% visited in the fall. (Figures were not made available for winter visits.) Private vehicles were the most popular mode of transportation (68%), followed by plane (25%), and bus (6%). Forty-three percent stayed in campgrounds, and 21% used no accommodation. The most common primary purpose for taking the trip to Alberta was to visit friends or relatives (36%), followed by vacation (34%), business (18%), and personal reasons (11%). The most popular activities for Canadian visitors to Alberta include visiting friends or relatives (64%), sightseeing by car (46%), relaxing and resting (38%), shopping (33%), or a personal or family affair (27%).

Over half of all household parties visiting Alberta were families or young couples. Older and retired couples accounted for 20% of household parties.

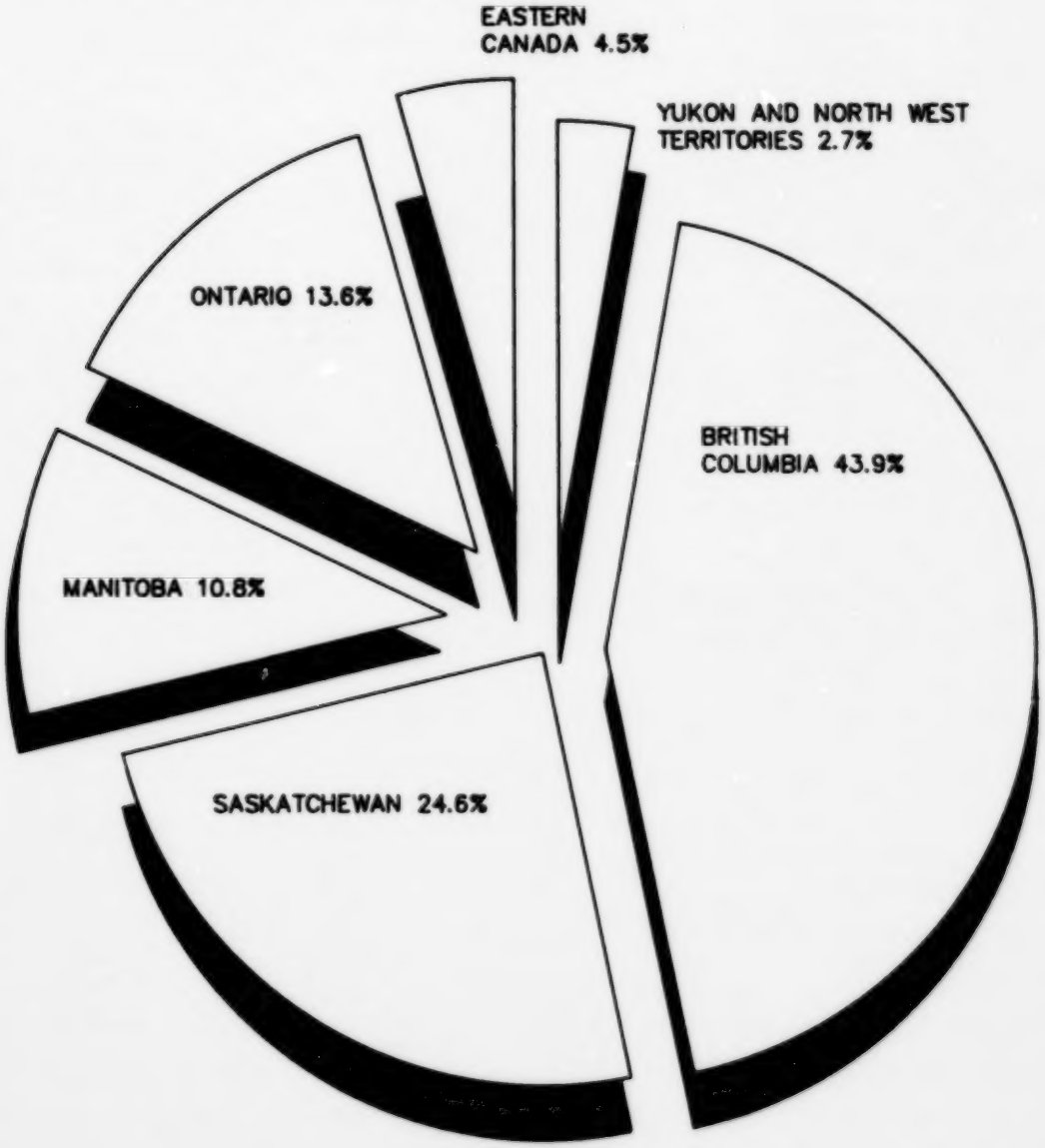
The study also contains information for visitors from each province. Figure 3.1 shows the distribution of household parties projected for each province.

Clearly, visitors from Alberta's neighbouring provinces dominate. Most visitors from other provinces follow the Canadian pattern, with some variations. Household parties from Saskatchewan were generally larger than average, at 2.23 persons, and those from eastern Canada (Quebec and the Atlantic provinces) were smaller than average, at 1.39 persons. Visitors from eastern Canada spent more than the average number of nights in Alberta, at 25.25, and also spent more than the average number of nights away from home at 38.85. Visitors from Ontario spent an average of 23.56 nights away from home on their trips to Alberta.

Manitobans took more spring trips to Alberta than the average for all Canadians, at 23%, and eastern Canadians were more likely to visit Alberta in the summer (66%). Visitors from the Yukon and North West Territories are more likely to visit in the fall (42%).

Visitors to Alberta from other Canadian provinces also show some variation in mode of transportation and accommodation. Visitors from Saskatchewan were much more likely to travel by private vehicle than the average, and visitors from more distant parts of the country, especially eastern Canada, were much less likely to travel by private vehicle. They were more likely to travel by airplane than the average, and they used buses more than the average. Visitors from Manitoba stayed with friends or

Figure 3.1
CANADIAN HOUSEHOLD PARTIES BY PROVINCE OF RESIDENCE



Source: Travel Alberta, 1982 Alberta Travel Survey

relatives more than the average, while visitors from the Yukon and North West Territories and from Ontario were more likely to stay in hotels or motels.

There is also some variation in the primary purpose of the trip. Eastern Canadians travelled more for vacation and for business than the average, and less for visiting friends and relatives. Visitors from the Yukon and North West Territories were similar to eastern Canadians in this respect.

The most popular activities for visitors to Alberta from other parts of the country were similar to the average, with a few variations in ranking among the top five. Visitors from Ontario and the Yukon and North West Territories also included photography and visiting museums and historical displays, sites, reconstructions, or relics among the most popular activities.

This information about Canadian visitors to Alberta may help to refine further the domestic market for Alberta tourism. As with Albertans travelling within Alberta, many Canadians from other provinces come to Alberta to visit friends and relatives. Almost half were also interested in sightseeing, and therefore local people who are familiar with nearby attractions and facilities may encourage their guests to visit these places. Promotion through local people, especially for sites with a uniquely "Albertan" flavour, may be beneficial.

The reasons for the decline in numbers of visitors from other parts of Canada are not clear. The changing Alberta economy may have had an influence. The years of recession in this province have reversed the previous trend of attracting people to live and work in this province. To the extent that visits to Alberta are motivated by visiting friends or relatives, or perhaps by

"scouting" vacations to assess relocation possibilities, the economic change would also reverse the tourism trends. Figures for 1988 may show an increase in the number of Canadian visitors to Alberta, attracted by the XV Olympic Winter Games and by a record-setting Stampede. The challenge for Alberta tourism may be to maintain or increase the number of Canadian visitors in less spectacular years.

4.0 THE INTERNATIONAL MARKET

Although, as discussed above, non-Canadian visitors account for less than 13% of person-trips to Alberta, attracting tourists from other countries remains an appealing prospect for the Alberta tourism industry. The number of visitors from the U.S. and overseas grew between 1982 and 1987 both in absolute numbers and in proportion of total trips. Alberta may have the opportunity to capture some of this growth. In addition, Calgary and the surrounding region have a great deal of experience in attracting international tourists because of the Calgary Stampede, Banff National Park, and the 1988 Olympic Winter Games. However, despite the increasing international market for tourism, and the high visibility of international tourists in the Calgary area, it is important to keep this segment of the market in perspective.

Section 4.1 will examine the most recently available data about international visitors to Canada and to Alberta, in an attempt to place the region's role as an international tourism destination in context. The most recent comprehensive data available will be used to provide some details about international visitors to the tourism zones that overlap the Calgary region.

Section 4.2 will provide profiles of tourists from the U.S. and overseas to allow local tourism promoters to see how local

attractions might fit with what international tourists expect from a vacation.

4.1 Current Key International Markets

Table 4.1 shows the residence of international visitors on trips of one or more nights to Canada.[5] This table contains a great deal of data, but perhaps the most important points to be made are:

- The majority of international visitors come from the United States, with that country accounting for about 87% of international visitors in 1986. Europe accounted for over 7% and Asia for about 3%. Over one-third of European visitors to Canada came from the United Kingdom in 1986, and over one third of Asian visitors to Canada came from Japan that year.

- The general pattern over the years 1980 to 1986 is one of growth. A decline in 1982 followed by steady growth resulted in an increase of more than 22% over the seven-year period. Keep in mind, however, that Expo 86 may have boosted tourism figures in 1986, and that those high levels may not have continued in 1987. Data for 1988, when available, will likely show high levels prompted by the Winter Olympics, both directly and indirectly.

- The number of visitors to Canada from Europe remained about the same over this period, with the large decrease in visitors from the United Kingdom offset in part by increases in visitors from other parts of Europe.

- The number of visitors from Asia has increased significantly

Table 4.1

Residence of International Visitors on Trips of One or More Nights to Canada, 1980-1986

Thousands of Person-Trips by Year

Residence	1980	1981	1982	1983	1984	1985	1986	% Change 1980-1986
United States	10,963	10,968	10,462	10,913	11,295	11,558	13,608	+24.1
Europe	1,163	1,169	1,068	936	985	932	1,159	-0.3
United Kingdom	489	485	426	363	350	314	400	-18.2
West Germany	189	200	184	163	170	157	198	+4.8
France	114	119	118	91	111	107	140	+22.8
Other Europe	371	365	340	319	354	354	421	+13.5
Asia	305	317	312	336	374	365	496	+62.6
Hong Kong	30	36	38	45	50	41	61	+103.3
Israel	34	38	36	39	37	32	50	+47.1
Japan	123	114	115	117	135	146	197	+60.2
Other	119	130	123	135	152	147	188	+58.0
Oceania	79	76	78	73	87	88	108	+36.7
Australia	58	57	60	56	68	70	77	+32.8
New Zealand	17	16	15	13	15	14	25	+47.1
Other	3	4	4	4	4	4	5	+66.7
Caribbean, Bermuda and Central America	102	98	101	98	97	94	96	-5.9
South America	76	73	72	58	52	51	64	-15.8
Other North America	55	64	43	29	40	43	48	+12.7
Africa	42	46	48	48	46	40	43	+2.4
Total	12,785	12,811	12,183	12,491	12,975	13,171	15,621	+22.2

Source: Statistics Canada, Touriscope 1988 Tourism in Canada: A Statistics Digest, p. 73.

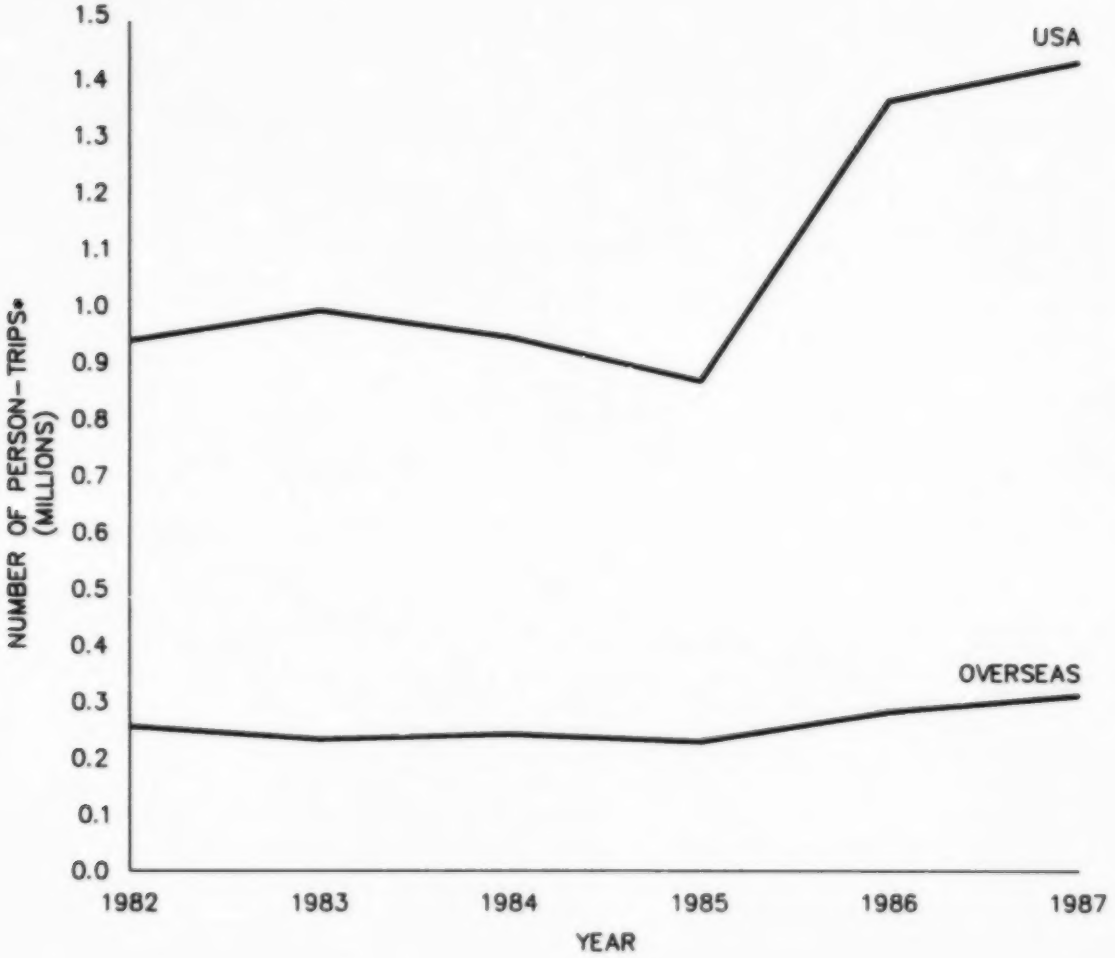
over the selected years, at a rate of over 62%. Although the number of visitors to Canada from Hong Kong is small, the growth rate over the five-year period was 103%.

Figure 4.1 shows trends for the province of Alberta.[6] A comparable breakdown of residence for overseas visitors, and figures for 1980 and 1981 are not available. However, the dominance of the United States as a source for visitors to Alberta is evident. In 1987, over 82% of all non-Canadian visitors to Alberta came from the U.S.

The figure also shows that the number of U.S. visitors declined following 1983, to a low in 1985, followed by rapid recovery in 1986. This pattern may be caused by the recession in the United States causing Americans to delay trips to Canada. The recovery in 1986 may therefore be an expression of this "pent-up" demand and of the numbers of Americans who may have combined trips to Alberta with visits to Expo 86 in Vancouver.

To the extent that the Canada-wide and Alberta figures can be compared, it appears that Alberta captures about 10% of the U.S. visitors to Canada, and about 15% of overseas visitors to Canada. Although this pattern may not hold true for all other countries, and the distribution of visitors across Canada may not be uniform, it is clear that the numbers of visitors to Alberta from some countries would be very small. At the level of the Calgary region, which in turn attracts a portion of the total number of visitors to Alberta, the international tourism market likely consists of only a few key countries, including the U.S., the United Kingdom, West Germany and Japan.

Figure 4.1
RESIDENCE OF INTERNATIONAL* VISITORS TO ALBERTA



Source: Alberta Tourism
*On trips of one or more nights

U.S. Visitors

Table 4.2 shows some more specific measures of the residence of American visitors to Canada.[7] Again, this table contains a great deal of detail that may not be significant for Alberta. Most American visitors to Canada come from the highly populated Middle Atlantic and East North Central Regions, which are close to Canada's major population centres in Ontario and Quebec. Alberta probably does not capture many American visitors from these regions. Those American areas close to Alberta generally contribute fewer visitors to Canada. However, 1986 shows a dramatic rise in the number of person-trips taken by residents of the Pacific and Mountain regions of the U.S., probably prompted by Expo 86. Again, this type of "special-event" tourism may not be repeated in following years.

Figure 4.2 shows 1986 estimates for U.S. visitors to Alberta by region.[8] The breakdown confirms that about one-third of all U.S. visitors to Alberta were from the Pacific region, followed by the mountain region. These, therefore, represent the main U.S. tourism markets for Alberta.

The 1982 Travel Alberta study of non-resident visitors to Alberta provides some more specific information about American visitors to each of the zones which overlap with the Calgary Region.[9] This information is now several years old, and may not reflect current conditions. New tourism development in some of the zones may attract U.S. visitors and change some of these figures. Table 4.3 shows the U.S. household parties visiting Alberta and each of the four zones as a percentage of total non-resident household parties. (Keep in mind that Albertans are excluded from these figures.)

Table 4.2

Region of Residence of U.S. Visitors on Trips
of One or More Nights to Canada, 1980-1986

Thousands of Person-Trips by Year

	1980	1981	1982	1983	1984	1985	1986
United States Total	10963	10968	10462	10913	11295	11558	13608
New England	1297	1362	1161	1323	1282	1423	1612
Middle Atlantic	2793	2723	2371	2758	2500	2342	3047
South Atlantic	670	761	709	733	922	868	1014
East North Central	2733	2662	2836	2603	2892	2975	2762
West North Central	1052	1070	1084	965	1014	1124	1179
East South Central	94	113	70	174	147	152	171
West South Central	249	247	210	166	282	332	357
Mountain	291	364	326	378	342	385	567
Pacific	1732	1593	1526	1658	1834	1869	2808
Other States	52	73	169	155	80	88	90

Source: Statistics Canada, Touriscope 1988 Tourism in Canada: A Statistical Digest, p. 73.

Table 4.3

U.S. Overnight Visitors to Alberta

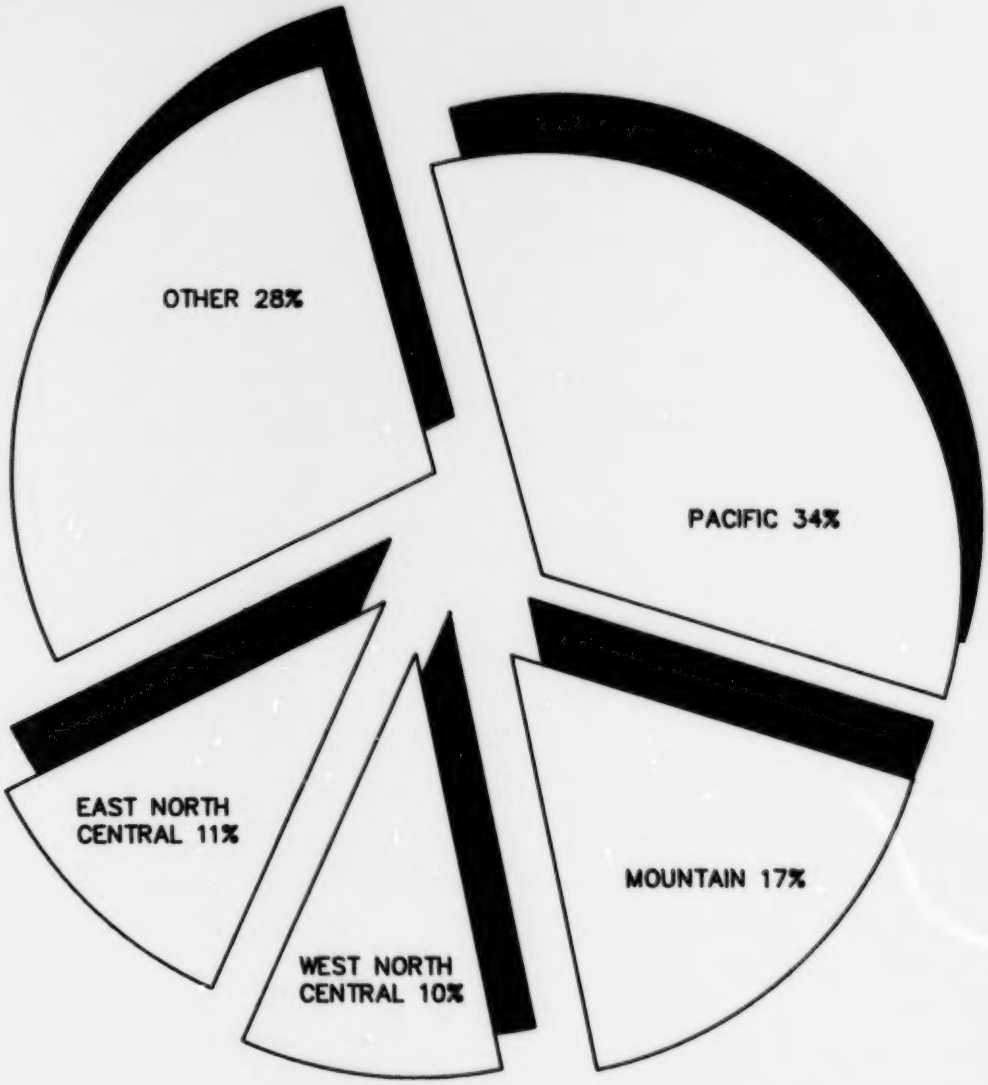
Overnight Trips To	% of Total Non-Resident Household Parties
Alberta	23%
Chinook Country	39
Big Country	17
David Thompson Country	22
Calgary and District	21

Source: Travel Alberta, 1982 Alberta Travel Study.

The study also shows that U.S. visitors accounted for 42% of all non-resident household party trips to Chinook Country, 39% of all overnight visits to that zone, and 30% of all visits where Chinook Country was the main Alberta destination. This is higher than for most other zones, and is probably because the zone borders on the U.S. The northern portions of the zone, which include the M.D. of Foothills, may not experience the same high percentage of American visitors. This area may attract some U.S. visitors who travel specifically to the northern part of the zone, or who drive through it on their way to other more northerly zones. Under these circumstances the percentage for the Foothills area would likely be much lower than the 39% and may be more in line with the other zones around Calgary.

U.S. visits to Calgary and District, which includes the City of Calgary and a corridor west of the city, accounted for 27% of all visits to the zone, 21% of all overnight visits to the zone, and 16% of all visits where Calgary and District was the main Alberta destination. Americans staying overnight in Calgary represented 21% of all non-Albertan overnight visits to Calgary, while Americans staying overnight in Canmore represented 35% of the

Figure 4.2
PERSON-TRIPS TO ALBERTA FROM THE USA BY REGION (1986 ESTIMATES)



Source: Alberta Tourism Market Development

51,000 total non-Albertan household parties staying overnight in Canmore.

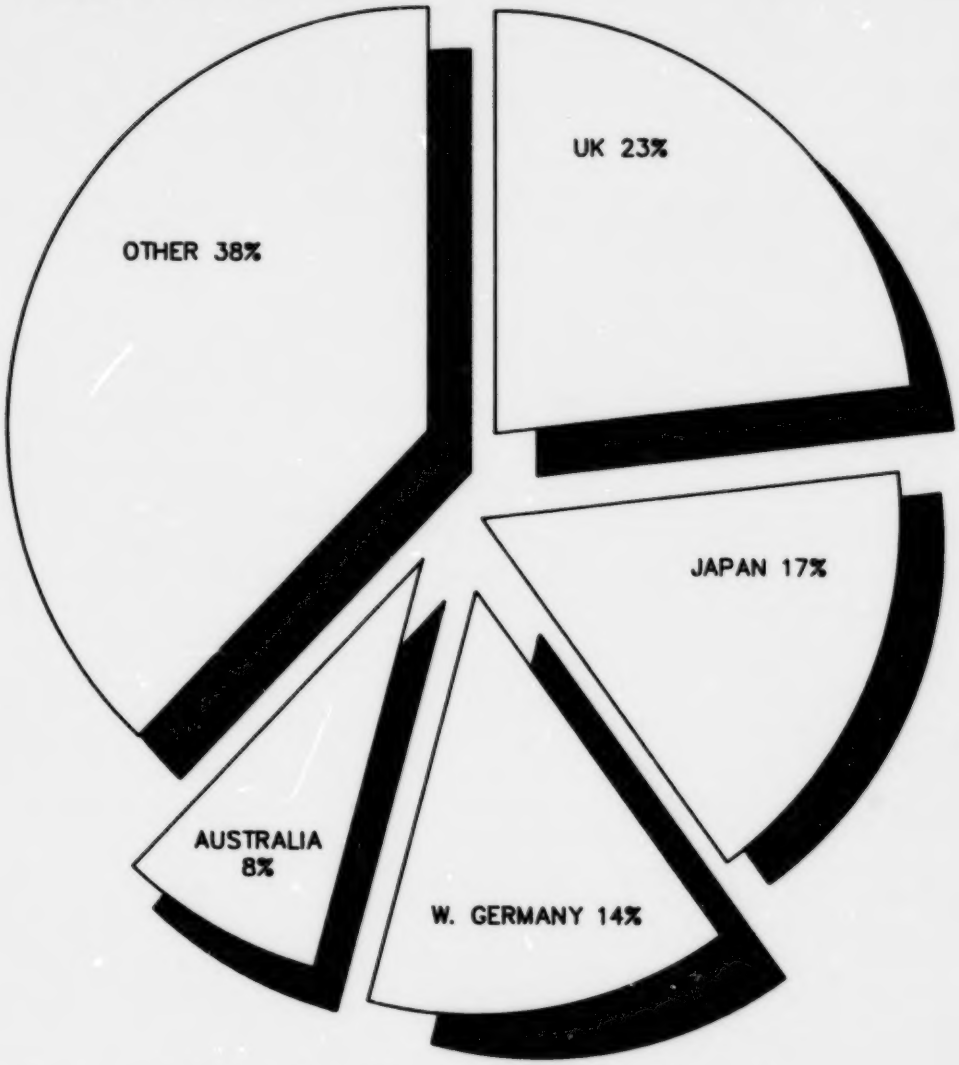
Again, parts of the Calgary region may derive benefits from U.S. visitors driving through on their way to other destinations, by providing highway commercial services, or by directing touring and sight-seeing visitors to local attractions. In addition, U.S. visitors staying in Calgary may enjoy day-trips in the surrounding area, and this too represents a market for attractions in the region.

Overseas Visitors

Figure 4.3 shows 1986 estimated breakdowns for overseas visitors to Alberta.[10] The figure show that the largest percentage of overseas visitors to Alberta from a single region came from the United Kingdom that year, followed by Japan. Note that Japan accounts for a larger portion of visitors to Alberta than of visitors to Canada. These figures indicate that the United Kingdom, Japan, and West Germany are Alberta's major overseas tourism markets. All other overseas regions combined accounted for over one-third of overseas visitors to Alberta.

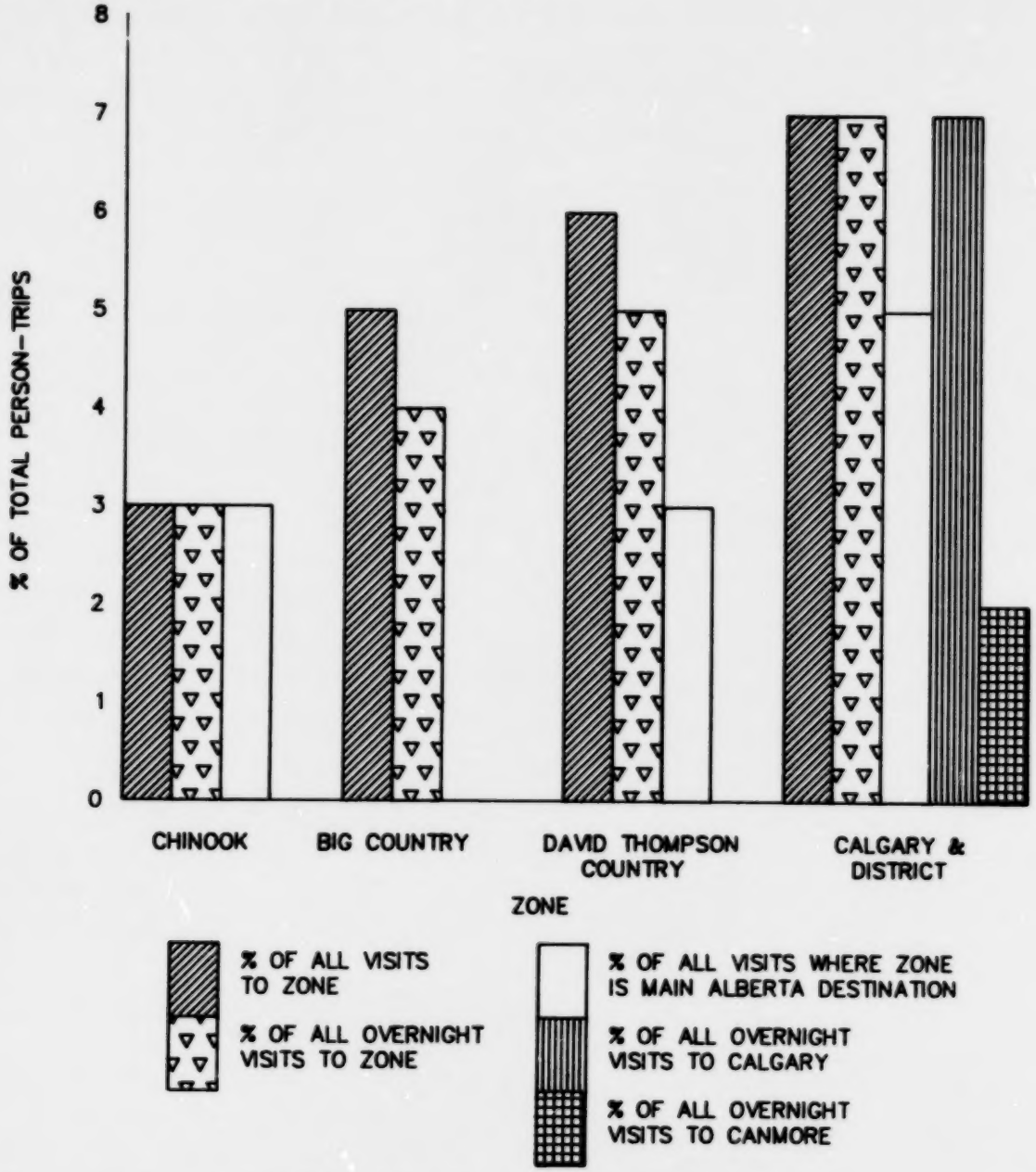
Travel Alberta's 1982 Alberta Travel Survey shows the significance of all overseas visitors to the province as a whole and to each of the tourism zones in the Calgary Region.[11] Overseas visitors accounted for 6% of overnight trips to Alberta by non-residents, 3% of overnight trips to Chinook Country, 4% of overnight trips to Big Country, 5% of overnight trips to David Thompson Country, and 7% of overnight trips to Calgary and District. (No breakdown of overseas regions is available by zone.) Figure 4.4 shows more information by zone.

Figure 4.3
PERSON-TRIPS TO ALBERTA FROM OVERSEAS (1986 ESTIMATES)



Source: Alberta Tourism Market Development

Figure 4.4
OVERSEAS VISITORS AS PERCENTAGE OF TOTAL



Source: Travel Alberta 1982 Travel Survey

International visitors accounted for a relatively small percentage of all non-resident visitors to Alberta, but seem to have been slightly more significant in the Calgary and District zone.

The 1982 study further shows that international visitors account for 6% of visits in each of the three seasons considered, and, although the percentages are small, visitors from the United Kingdom and Europe are at least as likely to visit Alberta in the spring or fall as they are in the summer.

It may be worthwhile for local tourism promoters to attempt to increase the percentage of overseas visitors, especially as the general trend for this market is one of growth. As with other markets, day-trips taken by overseas visitors based in Calgary should not be ignored. It is likely here that local attractions may be most successful, and particularly if they offer some uniquely Canadian or Albertan experience. The next section discusses the kinds of experiences and features international visitors seek in their vacations. Local tourism promoters may be able to use this information to determine which attractions are best suited to international visitors, and to develop ways of marketing those attractions.

4.2 Characteristics of International Visitors

The previous section provides some of the information needed to examine the international tourism market for Canada and Alberta. The data show how many non-Canadians visit Canada and Alberta, and where these visitors come from. This section will provide some more descriptive information about these tourists, organized by their country of origin.[12] As suggested above, this very general information may be used to determine which local attractions and services best meet the needs of international

visitors, so that promotional activities can be effective. It is also important to keep this international tourism in perspective, and see it as a small but growing segment of the whole tourism picture.

United States

Tourism Canada's study of the U.S. pleasure travel market helps to determine what U.S. visitors look for in a vacation, and also describes the American image of Canada as a travel destination.

It is interesting to note that the study found that only about 15% of U.S. travellers consider Canada as a destination for any type of vacation. Most Americans, therefore, do not appear to be interested in visiting Canada. The American market for tourism in Canada, then, is much smaller than might have been expected. Those that do come to Canada seem to take only a few main types of vacations.

The study found that most trip-nights spent in Canada by U.S. visitors were spent as part of a touring vacation, which is described as a "trip by car, bus or train through areas of scenic beauty, cultural or general interest." Table 4.4 shows the structure of vacation type by U.S. visitors to Canada.

Table 4.4

Types of Vacation
for U.S. Visitors to Canada

Type of Vacation	% of Total Trip-Nights
Touring	37%
Visiting friends and relatives	23
Outdoor	20
City	8
Close-to-home leisure	6
Resort	3
Theme park/special event	2
Cruise	1
Total	100

Source: Tourism Canada

As the table shows, visiting friends and relatives was the second-most popular type of trip taken by Americans in Canada. The third most popular vacation type was an outdoors trip, defined as a trip in a natural area where travellers may camp, hunt, fish, hike or raft. The study further shows that Canada attracts about 7% of the total U.S. touring vacation market, and about 5% of the total U.S. outdoors vacation market.

The typical touring vacation lasts about eight days and is planned well in advance. This type of vacation is usually taken by car, but air, bus, and rented car travel are also significant. Most touring travellers stay in motels or hotels, and about 20% of these trips are package tours. The Pacific coast is the preferred destination for this type of trip, attracting 35% of all touring trips. Quebec (21%) and Ontario (20%) are also popular, followed by the Rocky Mountains (15%).

The items of most importance to U.S. visitors in a touring

vacation are that the destination has beautiful scenery, has lots to see and do, is not dull, is a well-known area, and is popular. Walking and strolling about, visiting small towns and villages, dining at a variety of restaurants, sampling local cuisine, and visiting natural parks are the five most popular activities while on touring vacations. Canada's main competition for this type of vacation among American travellers is the U.S. itself. Therefore, U.S. travellers to Canada appear to seek differences from their own country, and are attracted by different cultural experiences.

The study suggests that Canadians seeking to attract U.S. visitors should target the touring vacation segment and promote those attractions and events that represent Canadian culture, while working to improve elements perceived as weaknesses by American visitors. These include hotels, restaurants, and landmarks.

The Calgary region's location on the eastern edge of the Rocky Mountains places it in a good position to attract U.S. touring visitors. With Calgary as a major centre for access to the Rockies, and as a destination in its own right, and with the popular and well-known Banff National Park as a major attraction, at least the Calgary and District tourism zone meets several of the criteria for U.S. visitors on a touring vacation. Coverage of the 1988 Olympic Winter Games may also help to promote other destinations, like Kananaskis Country, and access to this area through the M.D. of Foothills - at least in the summer - could be encouraged. An attraction like the Tyrell Museum in Drumheller may also help to draw American visitors away from the mountains and foothills and towards the prairies to the east of the region.

If local services meet the standards of the visitors, and local attractions reflect Canadian culture, they may benefit from the U.S. visitor taking a touring vacation. This type of visitor, who is by definition driving through "areas of scenic beauty, cultural or general interest" would appear to be ideally suited to the attractions the Calgary region has to offer.

The typical outdoors trip taken in Canada by Americans involves a young family with children travelling by car, truck or recreational vehicle and usually lasts about six or seven days. There are small segments within this group which seek more adventurous experiences, including mountain climbing, white-water rafting, ice fishing and trophy hunting, and are therefore significant for specific parts of the country. These segments, however, do not represent the typical outdoors traveller. The five most popular activities are walking or strolling about, exploring wilderness areas, being by a lake, seeing wildlife not usually seen, and visiting natural parks. Campgrounds are the main form of accommodation.

The most preferred destination for an outdoors trip is the Canadian Rockies (26%), followed by the Pacific coast (25%), Ontario (24%) and Quebec (17%). It is important to U.S. outdoor travellers that their destination has beautiful scenery, has lots to do and see, is not too wild, offers real adventure, and is not too far away.

As with the touring vacations, the Calgary region appears to have much to offer the U.S. visitor on an outdoor vacation. The Rockies are already attractive for the family camping type of holiday, and the region meets many of the criteria listed above. In addition, parts of the region are very well-suited to the small, more adventurous segments of the outdoors market. Local

tourism promoters thus face the task of determining which segment would be most attracted to their particular part of the region, and marketing local attractions to that segment.

Again, Canada's main competition for this kind of vacation is the U.S. Americans see the Canadian outdoors as more natural and untouched, and perceive Canada to offer a different lifestyle. However, the typical American outdoors tourist appears to perceive Canada as being a bit too wild, too far away, with fewer points of interest and a poorer climate. The study cautions that widespread promotion of Canada's wilderness and ruggedness may deter mainstream American tourists.

Tourism Canada concludes that there are opportunities to increase U.S. tourism to Canada by increasing awareness of Canada among Americans, by taking a regional approach to attractions and using our cities as gateways to those regions as well as destinations in their own right, and by emphasizing the excitement an "foreign-ness" of Canada.

This conclusion supports the suggestion that the Calgary region is well suited to attracting American tourists. The main city offers attractions and events in its own right, and serves as a gateway to a diverse and attractive region. Here, a Calgary-centred tourism planning region would appear to be more logical than the tourism zones now in effect. This is especially true for the co-ordinated promotional efforts that will likely be necessary to reach the increasing U.S. tourism market.

Japan

Japanese tourists represent a highly visible, although small, tourism market, especially given their attraction to Banff

National Park. The more local tourism promoters know about what Japanese tourists expect from a vacation, the more effective their tourism planning will be.

According to Tourism Canada's 1987 Pleasure Travel Markets to North America Highlights Report, (see Note 12) the typical Japanese traveller takes an all-inclusive package vacation as a couple or as a group of four or more, without their children. The most popular destinations are shown on Table 4.5.

Table 4.5

Destination of Most Recent Trip
by Japanese Travellers
(outside Japan within three previous years)

Destination	%
Far East/Asia	35
Hawaii/Guam/Samoa	31
Europe	15
Mainland U.S.	14
Canada	4
Australia/New Zealand	4
Other	2

Source: Tourism Canada

Tourism Canada reports that the most preferred destination for Japanese travellers over the two years following the survey were Europe (31%), Far East/Asia (18%), Mainland U.S. (17%), Hawaii/Guam/Samoa (13%), Australia/New Zealand (9%), Canada (7%), and other (5%).

The most popular activity while on vacation is touring the vacation area, at 42% of travellers. The top specific activities

are sightseeing in cities, shopping, dining out, guided tours, visiting scenic landmarks, taking pictures, sunbathing or beach activities, visiting amusement parks, swimming, and visiting galleries or museums. Visiting national parks or forests is ranked just below the top ten.

In choosing an overseas destination, Japanese travellers also attach a great deal of importance to outstanding scenery, value for money, and hygiene and cleanliness, followed by inexpensive travel to destination, and good shopping. Items like exotic atmosphere and friendly local people are considered only somewhat important.

The Tourism Canada survey also measured awareness of and interest in various destinations among Japanese travellers, on the assumption that tourists are more likely to visit places they have heard about and are interested in. The highest-ranked Alberta destination is Banff National Park, with 24% of respondents reporting an awareness of the Park, and 15% expressing an interest in it. Japanese respondents were more likely to be aware of Montreal (75%), Niagara Falls (69%), Vancouver (68%), Toronto (51%), and Ottawa (43%). They were interested in Niagara Falls (53%), Montreal (45%), Vancouver (44%), and Toronto (21%). San Francisco, Yosemite National Park, Los Angeles, Grand Canyon National Park, and Las Vegas are the U.S. destinations Japanese travellers were aware of and interested in, with each having higher percentages than Banff.

Tourism Canada found that Canada's advantages as a destination for Japanese tourists include scenery, safety, cleanliness, friendliness, and relatively inexpensive travel. Canada as a whole is, however, perceived as lacking good shopping, restaurants, museums, and art galleries, and the right kind of climate.

The report notes that shopping is a significant factor for Japanese tourists, because of the custom of buying gifts for family, friends, and co-workers.

The survey reports that most Japanese travellers to Canada are female, from Tokyo, with higher household incomes, and over 45 years old. Japanese visitors to the United States are generally younger (under 25), single, and better educated. About 40% of Japanese visitors to Canada visit Alberta, compared to 88% who visit British Columbia, 45% who visit Ontario, and 15% who visit Quebec. (The percentage figures exceed 100% because tourists may visit more than one province.)

A 1982 survey of non-resident visitors to Alberta[13] confirms that sightseeing, photography and shopping are the most popular activities for Japanese visitors to Alberta. The same survey found that the typical Asian household party visiting Alberta consisted of three people, without children under 18 years of age, with a chief wage earner under 45 years of age who had graduated from high school or university and who had a professional occupation, with no other head of household employed outside the home, and with an annual household income of $50,000 or more. The survey also found that Asian household parties visiting Alberta in 1982 spent an average of about $80 per night while in the Province.

The prospects for future Japanese visitors to Alberta are good. Alberta Tourism reported in 1988[14] that Japan has instituted a program to increase the number of people who travel outside Japan each year to 10 million by 1991. The policy is intended to help reduce Japan's balance of trade surpluses with its trading partners by increasing the travel account deficit. Alberta Tourism estimates that Alberta's share of the increased Japanese travel could mean 90,000 Japanese visitors in 1991, compared to an estimated 57,000 in 1987.

The Calgary region's main advantage for attracting Japanese tourists may be its proximity to Banff. The region also meets several other criteria, by providing scenery, city sightseeing, restaurants, galleries and museums. However, Canada's relatively low ranking as both an actual and a preferred destination may indicate that Japanese toursts will visit more popular destinations first before embarking on a Canadian holiday, thereby deferring the impact of increased numbers of Japanese travellers. Given the good connection between this part of Canada and Japanese tourists, Alberta and the Calgary region may attract a significant portion of the Japanese visitors to Canada.

United Kingdom

Tourism Canada[15] reports that the typical British traveller spends almost 28 nights on vacation during the summer or fall, and does not usually take package tours. About half of them travel as part of a couple, and about 20% travel with children. Table 4.6 shows the most popular destination for the two years preceding the survey, and the most preferred destination for the two years following the survey.

Table 4.6
Destinations of British Travellers

Destination	% of Most Recent Trips*	% of Intended Future Destination
Mainland U.S.	37	18
Canada	16	10
Asia/South Asia	15	39
Australia/New Zealand	12	6
Middle East	8	3
Central/South Africa	7	6
West Indies/Caribbean	5	7
Latin America	2	5
Hawaii/Guam/Samoa	1	3

* outside Europe and North Africa within three previous years

The most popular activies for British travellers are visiting friends or relatives (52%) and touring (23%). The top ranked specific activities are shopping, taking pictures, dining out, sightseeing in cities, sampling local foods, visiting scenic landmarks, touring the countryside, visiting friends or relatives, visiting historic places, and sunbathing or beach activities.

When choosing an overseas destination, British travellers rate the following features as important: sunny climate, reliable weather, hygiene and cleanliness, personal safety, and value for money. They consider only somewhat important characteristics like wide open spaces, good beaches, and national parks and forests.

The Tourism Canada survey found that British tourists are attracted by Canada's scenery, transportation, hotels, personal safety and the friendliness of the people. The cost of Canadian vacations, historical sites, weather, and beaches were seen as weaknesses, as were, to a lesser extent, restaurants and shopping.

The survey reports that most British visitors to Canada are older, less educated, and of lower income than British visitors to the United States. The survey also notes that 80% of British people visiting Canada do so to visit friends or relatives, which is much higher than the average for British travellers overall. About 39% of British tourists to Canada visit Alberta, compared to 75% who visit Ontario, and 45% who visit British Columbia. (Again, tourists may visit more than one province.)

The 1982 Travel Alberta study of non-resident visitors to this province found that the typical British household party visiting Alberta consisted of two people, without children under 18, with a chief wage earner over 45 years of age who had graduated from

high school or technical school and who had a professional occupation, and with no other head of household employed outside the home. The Alberta Survey found that the most popular activities for British visitors were visiting friends and relatives, sightseeing, and relaxing. British household parties visiting Alberta were also found to spend an average of over $37 per night while in the province.

The region surrounding Calgary certainly offers scenery, good transportation, and some other features desirable to British visitors. Canada's relatively high ranking as a destination, and Alberta's popularity help to place the Calgary region in a good position to attract visitors from the United Kingdom. The role of friends and relatives in Canadian vacations taken by British visitors is extremely significant, and may provide a means of reaching this market.

West Germany

Tourism Canada's survey[16] found that the typical West German traveller does not take package vacations, leaves Germany in the summer or spring, and takes a holiday of over 26 nights. About one-third travel alone, and another one-third travel with one other person, and travelling with children is rare. Table 4.7 shows the most popular destination in the three years preceding the survey, and the most preferred destination for the two years following the survey.

Table 4.7

Destinations of West German Travellers

Destination	% of Most Recent Trips*	% of Intended Future Destinations
Mainland U.S.	36	16
Asia/South Asia	16	34
Central/South Africa	12	8
Canada	8	12
Latin America	7	11
Australia/New Zealand	7	4
Middle East	6	4
West Indies/Caribbean	5	4
Hawaii/Guam/Samoa	3	3
Mexico	0.5	4

* outside Europe and North Africa within three previous years.

The most popular activities for West German travellers include visiting a resort (38%) and visiting friends or relatives (28%). About 14% of West German travellers take a combined business and pleasure trip, compared to 8% for each of Japanese and British travellers. The top ten ranked specific activities for West German travellers are dining out, sampling local foods, sightseeing in cities, taking pictures, contacting local inhabitants, shopping, visiting scenic landmarks, visiting the seaside, swimming, and touring the countryside.

When choosing an overseas destination, West German tourists attach the most importance to friendly local people and a sunny climate. Sightseeing, inexpensive travel, and national parks and forests are given less importance. Despite this, Canada's advantages over other destinations are its outdoors, and its

cultural diversity. Its disadvantages include the image of a lack of beaches and reliable weather, travel costs, value for money, and public transportation.

According to the survey, the typical West German visitor to Canada tends to be over 45 years of age, and is most likely visiting friends or relatives. West German tourists in Canada are more likely than their counterparts in other countries to participate in outdoor activities. About 15% of West German visitors to Canada visited Alberta, compared to 41% for Ontario, 35% for Quebec, and 28% for British Columbia.

The 1982 Travel Alberta study has no specific information to provide a profile of West German visitors to Alberta, but it does contain information about the most popular activities for West German tourists in Alberta. These include visiting friends or relatives, taking photographs, sightseeing by car, and camping. There was no specific data about expenditures of West German visitors to Alberta.

Some factors appear promising for the Calgary region. Canada as a whole is a relatively popular destination for West German travellers, and although Alberta ranks relatively low for destinations with Canada, the province and Calgary in particular may be well suited to the popular combined business and pleasure type of vacation. The region may also provide the sightseeing, touring and contacting local inhabitants components of a vacation.

France

The Tourism Canada survey[17] found that most French travellers do not take package vacations, and travel most during July and August. They usually travel with one other person, and about 20%

travel with children. Table 4.8 shows the most popular destination for the three years preceding the survey, and the most preferred destination for the two years following the survey.

Table 4.8

Destinations of French Travellers

Destination	% of Most Recent Trips*	% of Intended Future Destinations
Mainland U.S.	22	18
Asia/South Asia	18	27
Central/South Africa	18	7
Middle East	13	7
West Indies/Caribbean	10	5
Latin America	8	12
Canada	8	7
Australia/New Zealand	1	8
Mexico	1	4

* outside Europe and North Africa within three previous years.

French travellers are most likely to take a touring vacation (33%), visit friends or relatives (30%) or combine business and pleasure (23%). The top ranked specific activities are sampling local foods, dining out, taking pictures, sightseeing in cities, shopping, contacting local inhabitants, visiting the seaside, visiting scenic landmarks, visiting wilderness areas, and touring the countryside. French travellers generally attach the most importance to taking "opportunities to increase knowledge" when choosing an overseas destination, and less importance to wildlife.

The survey found that Canada's advantages as a destination for French tourists include its cultural groups, outstanding scenery,

wildlife, national parks, friendly local people, personal safety, and hygiene and cleanliness. Its disadvantages include cost, climate, perceived lack of beaches and historical sites, and restaurants.

French travellers to Canada tend to have higher incomes and education levels than their counterparts to non-North American destinations. They are also more likely to be visiting friends or relatives, or combining business and pleasure travel than is the case elsewhere. About 12% of French tourists in Canada visit Alberta, compared to 88% who visit Quebec (64% visit Montreal), 44% who visit Ontario, and 15% who visit British Columbia.

The Travel Alberta survey has no information specific to French travellers to Alberta.

The Calgary region appears to meet some of the needs and expectations of French travellers. The area is well suited to a touring type of vacation and provides sightseeing, wilderness areas, scenery, wildlife, and some of the cultural features of a vacation. However, the relatively low ranking of Canada as a destination, and Alberta's low ranking as a destination within Canada, may keep the French tourism market small.

5.0 SUMMARY

Each municipality is able to list those attractions it has to offer to the travelling public. Prospect: The Region's Tourism Market has instead concentrated on factors that cannot be ignored by municipalities or regions planning to expand tourism to their communities. These include:

° Albertans themselves account for over two-thirds of all person-trips taken in Alberta. They are, however, more likely to travel in private vehicles, and are less likely to stay in hotels or motels than visitors from outside the province.

° The number of other Canadian visitors to Alberta has been declining during the 1980's. Municipalities might need to assess the costs and benefits of taking steps to reverse this trend.

° The American market appears to be growing, although U.S. visitors to Alberta account for only about 10% of total person-trips. Those wishing to attract American visitors should consider aiming promotional activities at those specific regions and segments of the American market that are most likely to be interested in an Alberta vacation. It is also apparent that the mainstream U.S. tourist is looking for popular, "tried and true" destinations.

° Overseas visitors represent only about 2% of all person-trips in Alberta, despite their high profile in the Calgary and Banff areas. This market also appears to be growing. To capture this market, Alberta destinations may have to improve certain amenities - restaurants, hotels, and shopping - which are sometimes perceived as weaknesses.

° In most cases, summer is the dominant season for travel in Alberta, with reduced person-trips in the "off-season."

° Finally, a significant component of almost every market for tourists to Alberta visits friends or relatives while in the province. This observation, combined with the dominance of Albertans as a tourist market, might prompt promoters of Alberta destinations, especially those of a more local, less widely-known nature, to consider marketing aimed at local people. This could have the two-pronged effect of increasing local visits to the attraction, and of providing hosts with suggestions for their visiting friends or relatives from other parts of Alberta, Canada, or the world.

Areas that are serious about increasing tourism must consider at least these main factors about the market they will be trying to serve. If not, they risk wasting time, effort, and money in misdirected and therefore inefficient marketing and promotional efforts.

Finally, for the benefit of local tourism promoters, the missing pieces creating the gaps in this report must be found. Tourism zones should be restructured to reflect actual tourism patterns more logically. This will assist not only with the way data are organized, but will also permit a more co-ordinated planning and promotional effort among those attractions and destinations for which Calgary is the "gateway". If this is not possible, some consistent means of collecting, compiling and publishing local data is necessary so that the Calgary region can be examined directly. Additional research into Albertan's touring their own province should also be conducted. If this group represents the major market for Alberta tourism attractions, its dominance should be reflected in data availability.

The traditional view of the tourist as a visitor from another country staying in hotels clearly accounts for only a very small part of tourism in Alberta and the Calgary region. This suggests that attempts to promote tourism based on this traditional view may also miss the greater portion of the tourism market. Departures from the traditional perspective will necessarily involve creativity and adaptability on the part of local tourism promoters, but may also produce significant benefits.

NOTES

1. Alberta Tourism, Alberta Tourism Indicators, July 1988.

2. Travel Alberta, Market Development Branch, Zone Profiles, 1986.

3. Alberta Tourism, op. cit.

4. Travel Alberta, 1982 Alberta Travel Survey: A Non-Resident Visitor Study Summary Report, Vol. 1, Alberta Tourism and Small Business, Edmonton.

5. Statistics Canada, Touriscope 1988 Tourism in Canada: A Statistical Digest.

6. Alberta Tourism, op. cit.

7. Statistics Canada, op. cit.

8. Alberta Tourism, op. cit.

9. Travel Alberta, 1982 Alberta Travel Survey.

10. Alberta Tourism, op. cit.

11. Travel Alberta, 1982 Alberta Travel Survey.

12. This section draws heavily on the following Tourism Canada publications, which appear to be the best available sources of information about non-Canadian visitors:

    Tourism Canada, The U.S. Pleasure Travel Market Study: Canadian Potential Highlights Report, Department of Regional Industrial Expansion, January 1986.

    Tourism Canada, Pleasure Travel Markets to North America: Japan, United Kingdom, West Germany, France Highlights Report, Department of Regional Industrial Expansion, June 1987.

13. Travel Alberta, 1982 Alberta Travel Survey.

14. Alberta Tourism, Pulse, Alberta Tourism Market Development, April 1988.

15. Tourism Canada, Pleasure Travel Markets to North America: Japan, United Kingdom, West Germany, France Highlights Report, pp. 25-37.

16. Ibid, pp. 38-48.

17. Ibid, pp. 49-59.